

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

4. Set-Up Document Review Routing

- | | | |
|------------|-----------------------------------|---|
| 4.1 | Introduction | This procedure describes the process to set-up a document default review routing in CSPS. The document review process is an optional level of review. The default review routing is established on “WFR004 - Document Review Setup”. Review routing can also be established on a per document basis on “WFR006 - Document Review Routing Sequence Screen” (See procedures in “Section 2.5 - Entering a Purchase Request” Step 43 or in “Section 11.5 - Entering a Purchase Order” Step 51) for more description on how to set-up one-time review routing on WFR006. |
| 4.2 | Who Performs the Procedure | Any employee with access to CSPS can view this screen. |
| 4.3 | Initiating the Process | The process begins when the “WFR004 - Document Review Setup” is accessed. Then, default review routing can be set-up for assorted document types. |
| 4.4 | Accessing the System | From the Main Menu, select Transaction. From the Transaction menu, select Admin. From the Admin menu, select “WFR004 - Document Review Setup” to enter default review routing. Follow the steps below for WFR004. |

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

- 4.5 Creating Default Review Routing** This procedure describes the steps necessary to enter a default review routing. Both upper and lower “control” boxes appear on the WFR004 screen. The upper “control” box is where employee information and document type information is input. On the other hand, a lower “control” box is where the employees are set-up in order to review the corresponding document type.

WFR004 - Document Review

Document Review (WFR004)

Default setup for Document Review

EMPLOYEE NO: 14192 DOCUMENT TYPE: PO

NAME: GROW, MATHEW Z ACTIVE STATUS: ☒

BUREAU: NOAA DATE: 29-JAN-1999

OPTION CODE: FM041

Route To:

SEQ NO	EMP NO	EMPLOYEE NAME
1	643	RORSTROM LEE, JERALDINE LYNN

Re-sequence (up/down arrows)

LIST SAVE OK CANCEL

STEP	ACTION
1.	Click the “Create Record” icon in the toolbar (i.e., the “Green Plus”) to create a new default review routing set-up,
2.	The EMPLOYEE NO field is system generated and will default in based upon the user’s login.
3.	The EMPLOYEE NAME field, will default in based on the EMPLOYEE NO .

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION
4.	In the BUREAU field, click on the combination box and select the appropriate bureau from the list of values.
5.	Click on the OPTION CODE combination box and select the appropriate screen from the list of values. Note: This field must be completed prior to the DOCUMENT TYPE field.
6.	Click on the DOCUMENT TYPE combination box and select the appropriate document type from the list of values. Note: The document type's list of values is derived by the option code selected.
7.	The ACTIVE field should be activated after all information has been entered on the bottom half of the screen.
8.	The DATE field is system generated and displays the day on which the record has been activated or deactivated.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION
<p>9.</p>	<p>THE ROUTE TO: section is located in the lower “control” box. This is where reviewers can be added, deleted, or resequenced. Click the mouse into the EMP NO field.</p> <p>a. To add a reviewer:</p> <p>(i) Double click on the EMP NO field or click the “LIST” button to access the Employee Lookup Screen (PRR001). Click the “Enter Query” icon and enter the last name of the employee that is to review the document in the “Last Name” field. Click the “Execute Query” icon. Select an employee, then click “OK”.</p> <p>Note: The EMPLOYEE NAME will default based on the EMP NO field. The SEQ NO represents the order in which reviewers may view the document.</p> <p>b. To delete a reviewer:</p> <p>(i) Highlight the specific EMP NO, by clicking on the “RED X” icon in the toolbar. The reviewer will no longer appear in the routing set-up.</p> <p>c. To resequence a reviewer:</p> <p>(i) Highlight the specific EMP NO, click either the UP or DOWN RE-SEQUENCE arrows. Each click will shift the reviewer up or down one spot.</p> <p>Note: WFR004 review routing set-up defaults into each document’s WFR006 based upon a document’s DOC TYPE. See procedures “Section 2.5 - Entering a Purchase Request” Step 43 for information on completing the “Document Review Routing Sequence Screen” (WFR006).</p>
<p>10.</p>	<p>Click the ACTIVE field to activate the current review routing.</p>
<p>11.</p>	<p>Click the “OK” button to save the information to the database, and then exit the screen.</p>

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

- 4.6** **Querying a Default Review Routing** This procedure describes the steps necessary to query a default review routing which has been set-up on the WFR004 screen.

STEP	ACTION
1.	<p>Click the “Enter Query” icon on the toolbar. Any data on the screen will be removed.</p> <p>To retrieve all records in the system, do not enter data in any of the fields.</p> <p>To retrieve only a subset of records, enter the relevant information in the applicable fields to narrow the search. The ‘%’ character can be used in most fields as a wildcard character. For example, to query all records that include an ‘r’, type %r%.</p>
2.	<p>Click the “Execute Query” icon on the toolbar to execute the query. The system will retrieve all records meeting the specified criteria.</p>
3.	<p>Use the “down” and “up” arrows on the toolbar or on the keyboard to view the retrieved records.</p> <p>If document review routing for an existing document type needs to be edited, uncheck the ACTIVE flag and refer to section 4.5 “Creating Default Review Routing” for further instructions.</p>